# Montana School Leaders:
# Superintendents and Principals
## Survey 2001-2002

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# Montana School Leaders: Superintendents and Principals Survey 2001-2002

The hiring and retention of teachers, administrators, and other certified staff has become a topic of discussion and concern in Montana and the nation over the past several years. In Montana, studies of certified staff shortages by the Montana School Boards Association (MSBA), the Certification Standards and Practices Advisory Council (CSPAC), the Montana Commission on Teaching, the Governor's Task Force on Teacher Shortage/Teachers Salaries, and other groups all observed that the recruitment and retention of teachers and other certified staff was becoming increasingly difficult.

In 2002, with the assistance of a Wallace-Readers Digest grant, a coalition of Montana education agencies and organizations was formed, the Montana State Action for Education Leadership Project (SAELP). They set out to examine legislation, policies, and practices that impact the supply and demand for school leaders in Montana. In an attempt to inform the discussion, this study was authorized to gather information from current administrators, potential administrators, and those who hire administrators. Surveys were sent to superintendents and principals, individuals who were qualified to be administrators but who were not currently employed in those positions, and the chairpersons of boards of trustees that hire school administrators. The response rate was overwhelming. Overall, 61% returned their surveys.

## Executive Summary

Over the next few years the ranks of school superintendents and principals in Montana will be seriously depleted by retirements. In this SAELP survey, 48% of the administrators indicated that they plan to retire within the next five years. That translates into an average of 56 retirements for each of the five years. Those figures only count retirements and don't include the other reasons that administrators might leave their jobs, such as changing careers or moving out of state.

The average school administrator has 20 years in the retirement system and is over 50 years of age. There exists a pool of already qualified administrators in the schools who do not currently hold administrative positions. But that pool has shrunk by 25% over the past three years, and their average age exceeds that of the current administrators. One-fourth of the pool indicates that they don't intend to apply for administrative positions in the future.

It appears the position of superintendent will be hardest hit by the retirements and lack of qualified candidates. Of the 84 who are employed both as superintendent and principal, 56 indicated they would be retiring within five years. Only 33 in the pool of administratively qualified teachers are endorsed as superintendents, Half of them say they don't intend to apply for any future openings, and over half already have 30 years in the retirement system.

After these groups retire, nearly half are expecting to leave Montana to continue working in education as teachers or administrators. Only one-fourth of them are considering staying in Montana and working part time in education.

The board chairs rate superintendents as well prepared for their jobs in all areas. The lowest rated area was assessment and evaluation, an area that is currently receiving statewide and national focus. The chairs of the larger districts rate the preparation of their superintendents higher in all areas than the chairs of the smaller districts. Yet administrators in larger districts have other staff and resources with expertise in a variety of areas. The administrators in the smaller districts most often must rely on their own experience and training for the multiple responsibilities of their jobs.

Both current administrators and those qualified to be administrators were in agreement on the factors that would make the jobs of administrators more attractive to new prospects and help keep experienced administrators in their positions longer. Better retirement benefits were rated first, higher salary second, and more time for instructional leadership third. They also identified which responsibilities they would consider having reassigned so they would have more time. Two responsibilities they identified for reassignment were federal programs oversight and reporting and data collection. Both are areas with greatly increased administrative responsibilities.

Both groups also gave relatively high ratings to a combination of professional support structures, including expanded professional development, strong administrative support networks, and mentoring programs. Internship programs were rated lower, although board chairs felt they were very helpful in meeting district needs.

The majority of the individuals who are qualified to be administrators intend to become administrators in the future, but most indicate a high level of satisfaction with their current positions. They also indicate that family considerations and not wanting to move are major reasons they are not currently serving as administrators.

Administrators also indicate a high level of satisfaction with their jobs, although those qualified to be administrators anticipate a higher level of satisfaction with administrative jobs than the current administrators' experience.

There is a wide gap between the difficulties administrators say they encounter in their jobs and what board chairs perceive as administrators' difficulties. They agree that the top rated difficulty is inadequate funding, but the administrators rate it considerably higher than the board chairs.

Nearly all districts hired administrations in the past five years and will hire in the next five. The board chairs had only a moderate level of concern about administrative hiring difficulties. They were moderately concerned about the small pool of applicants.

The incentives that are used by boards to recruit and retain administrators are mainly financial. Most are similar to those used in 1999, but a higher proportion of the districts are using them. Some emerging common strategies include encouraging local personnel to apply, providing signing and moving bonuses, and developing planned processes for recruitment.


## The Survey
Using the Office of Public Instruction (OPI) records for school year 2001-2002, SAELP surveys were mailed to 586 superintendents and principals. Surveys were also distributed to the chairpersons of 232 school district boards of trustees that hire administrators. Surveys were also sent to the 298 current certified staff members, nearly all teachers, who have administrative endorsements but were not serving in administrative positions. The mailings were done by OPI. All responses were anonymous. The only identifying information was the school size category and the geographic region. No follow-up calls or contacts were made.

A separate survey was designed for each group. Some questions were specific to the group being surveyed; other questions were the same for all. The surveys asked about demographics, work experience, and retirement questions as well as perspectives on responsibilities and factors that impact administrative positions. The three surveys can be found in **Appendix A**.

Nearly 700 surveys were returned for a 61% overall response rate. The individual survey rates were:
- Superintendents and principals – 77% response rate
- Qualified but not serving as administrators – 48% response rate
- Board chairs – 40% response rate

Most respondents completed every question in the survey. Few additional comments were received from the board chairs, but many thoughtful and often lengthy comments came from current administrators and those qualified to be administrators.

Although this was an anonymous survey, most envelopes included return addresses. Some responses added personal greetings and phone numbers if there were further questions.  Several expressed appreciation for this type of survey, and many requested information on the results.

The Montana Association of School Superintendents (MASS) administrative regions and the OPI district size categories were used to analyze response rates to determine appropriate categories for reporting. **Appendix B** provides a state map of the MASS administrative regions. District size category descriptions can be found in **Appendix C**. The representative overall percentages were used to project totals in instances where the number of cases or occurrences is cited.

The response rates for the surveys are shown in Tables D-1 and D-2 of **Appendix D**. The data was analyzed using size categories, regions, gender, and other appropriate groupings. In most instances larger groupings were used for reporting purposes, since some categories and regions are represented by small numbers.

**Appendix E** provides a perspective of the number of students served in the school size categories and the administrative regions. It also describes the larger categories that were used for analysis throughout this report.

## Montana Demographics

Montana's people and resources are not distributed evenly across the state. The population is concentrated to the west and southwest. There are more job and educational opportunities in those areas. The data in Tables 1 and 2 illustrates several differences.

When the districts are grouped by larger and smaller districts, the smaller districts have proportionately more teachers and administrators than students. But they have fewer in-house resources to call upon. They have disproportionately fewer administratively qualified staff who are not employed as superintendents or principals, and they are faced with using a much higher proportion of provisional and emergency credentials to fill positions.

**Table 1**
**Percent of State Totals by District Size, 2001-2002**

| School Systems | Students | Superintendents and Principals | Teachers/ Libr/Cnslr | Qualified as Admin | Provisional/ Emergency |
|---|---|---|---|---|---|
| Larger districts | 77% | 71% | 66% | 85% | 35% |
| Smaller districts | 23% | 29% | 34% | 15% | 65% |

The MASS administrative regions were used to analyze the data geographically. The state was divided diagonally into three areas: The West (Four Rivers, Northwest, and Western regions), Center (Central, North Central, and South Central regions), and East (Hi-line, Northeast, and Southeast region).

When the data is analyzed by geographic area, the West is relatively proportionate for all categories except for a lower reliance on provisional and emergency credentials to fill positions. The presence of four teacher education programs in the West – UM in Missoula, WMC of UM in Dillon, MSU-Bozeman, and Carroll College – probably provides better access to qualified staff. It also includes five of the largest (AA and 1E1H) school districts – Bozeman, Butte, Helena, Kalispell, and Missoula.

The Center region is the most proportionate across the categories. It has a slightly higher proportion of those who are qualified and not employed as administrators, and relies less on provisional and emergency credentials. This region also includes three teacher education programs – MSU-Billings, Rocky Mountain College, and the University of Great Falls. The state's two largest districts are in this area – Billings and Great Falls.

The East, the largest geographic area, has about one-seventh of the students in the state, employs about one-fifth of the administrators, and has about one-tenth of the qualified administrators who are not employed in that capacity. It includes only one of Montana's eight teacher education programs within its borders –MSU-Northern, which is located in Havre on the far western edge of the region. This area relies disproportionately on provisional and emergency credentials to fill positions, at about double the ratio of certified staff, as shown in Table 2. The largest school systems in the East are Havre and Miles City.

**Table 2**
**Percent of State Totals by Geographic Area 2001-2002**

| Area | Students | Superintendents and Principals | Teachers/ Librs/Cnslrs | Qualified as Admin | Provisional/ Emergency |
|---|---|---|---|---|---|
| West | 52% | 48% | 49% | 52% | 39% |
| Center | 34% | 34% | 34% | 39% | 29% |
| East | 14% | 18% | 17% | 9% | 32% |

## Superintendents and Principals

Nearly 80% of Montana's current superintendents and principals responded to the SAELP survey that was conducted in May of 2002. Their responses indicated that retirement would seriously impact Montana's administrative positions over the next five years. About 280 school administrators (48% of them) intend to retire within the next five years – that's an average of 56 per year. That percentage has increased since a 1999 Montana School Board Association (MSBA) survey. That survey indicated that 36% were planning to retire in the next five years. Those figures do not include the number that may leave prior to retirement for out-of-state positions or for other pursuits.

The average number of years the administrators have invested in the Teachers' Retirement System (TRS) has also increased since the MSBA survey. In 1999 it was 18.9 years: by 2002 it had increased to 19.9 years.

In the meantime, the pool of administratively qualified personnel currently working in the schools is shrinking. The number of teachers who are qualified to be superintendents or principals but who are not employed in those roles has declined by 25% over the past three years – from nearly 400 to about 300. And they have one more year in TRS than the current administrators – 21.0 years.

The position that will probably be most impacted by the retirements is the superintendent. Only a small number in the pool of administratively qualified teachers is endorsed as superintendent, and most of them don't intend to apply for administrative positions.

**Administrator Demographics:** The typical administrator or aspiring administrator in Montana is male, white, over 50 years old, and married with dependent children. He lives in the western part of the state and is employed as a principal but is likely to hold other district positions as well.

The male/female ratio for school administrators has changed over the years. In 1996-97 12% of the superintendents and principals were female. In 1998-99 the portion was 25%, and in 2001-02 it was 29%. The male/female ratio for those who are qualified but not employed as administrators has also changed over the years. In the 1999 MSBA survey, two-thirds of the qualified administrators were

male. This survey found the ratio nearly even – 51% male to 49% female. Table 3 details the demographics of the groups who were surveyed.

The reverse is true for American Indian administrators. More females were endorsed as school administrators than males. Only 1% of the males in both surveys identified themselves as American Indian, while 4% of the current female superintendents and principals and 3% of the qualified administrators reported being American Indian. Those are consistent with figures from OPI and lower than the reported ratios for 1996-97 and 1998-99.

Overall, only 3% of the current and qualified administrators identified themselves as minorities – 2% American Indian and 1% other. The American Indian ratio was about the same as the proportion of American Indian teachers, but much lower than the 10.5% American Indian student population.

Over half of the current administrators and those qualified to be administrators are 50 years old or older and are relatively close to retirement. Although the percent over 50 is similar for male and female current administrators, it is dissimilar for those who are qualified but not employed as administrators. Over 67% of the males were over 50, and only 47% of the females. None of the females in this group were over 60 years old.

In both surveys, the males were more likely than the females to be married and to have dependent children. Overall, 90% were married and the majority had dependent children. Both the single males and single females were much less likely to have dependent children than their married counterparts.

**Table 3**
**Demographics of Current and Qualified Administrators 2001-2002**

| Category | Current Administrators | | | Qualified as Administrators | | |
|---|---|---|---|---|---|---|
| | Overall | Male | Female | Overall | Male | Female |
| **Gender** | | | | | | |
| Percent of total | | 71% | 29% | | 51% | 49% |
| | | | | | | |
| **Race/ethnicity** | | | | | | |
| White | 97% | 98% | 96% | 97% | 99% | 96% |
| American Indian | 2% | 1% | 4% | 2% | 1% | 3% |
| Other | 1% | 1% | 0% | 1% | 0% | 1% |
| | | | | | | |
| **Age** | | | | | | |
| Under 40 years old | 13% | 15% | 11% | 18% | 14% | 23% |
| 40 to 50 years old | 32% | 30% | 36% | 25% | 19% | 30% |
| 50 to 60 years old | 49% | 49% | 50% | 55% | 63% | 47% |
| 60 or older | 6% | 6% | 4% | 2% | 4% | 0% |
| | | | | | | |
| **Marital status** | | | | | | |
| Married | 89% | 94% | 77% | 85% | 91% | 81% |
| - with dependent children | 60% | 64% | 51% | 54% | 51% | 57% |
| Single | 11% | 6% | 23% | 14% | 9% | 18% |
| - with dependent children | 32% | 35% | 30% | 26% | 33% | 23% |
| Overall dependent children | 59% | 63% | 47% | 54% | 49% | 50% |

The surveyed administrators were employed as superintendents or principals, and often as both. Table 4 shows the proportions that have various assignments or endorsements. Only 13% serve as both superintendent and principal, but nearly all of them are principals at two levels of schools.

Of those who are qualified to be administrators but are not employed in that capacity, only a small number have superintendent's qualifications – 33, and all of them are male. Seventeen have endorsements as supervisors of programs (special education, counseling, reading, curriculum), and 281 have principal's endorsements (including the 33 who also have superintendent's credentials).

**Table 4**

**Administrative Positions 2001-2002**

| Position | Current Administrators | | | Qualified Administrators | | |
|---|---|---|---|---|---|---|
| | Overall | Male | Female | Overall | Male | Female |
| | employed as | | | endorsed as | | |
| Superintendent | 36% | 43% | 19% | 11% | 22% | 0% |
| Superintendent only | 22% | 28% | 7% | -- | -- | -- |
| Principals | 78% | 72% | 93% | 94% | 96% | 93% |
| Principal only | 65% | 57% | 81% | 83% | 74% | 93% |
| Superintendent and principal | 13% | 15% | 12% | 11% | 22% | 0% |
| Supervisor | not surveyed | | | 6% | 4% | 7% |

Table 5 indicates superintendent and principal assignments by percent and count of total administrators.

**Table 5**

**Assignments of Superintendents and Principals**

| - - Individuals - - - | | - - - -Administrative Assignment in 2001-2002 - - - - | | | |
|---|---|---|---|---|---|
| | | | - - - - - - - Principal - - - - - - - - | | |
| Percent | Number | Superintendent | Elementary | Middle/7-8 | High School |
| **Single administrative assignment** | | | | | |
| 31% | 182 | | X | | |
| 22% | 126* | X | | | |
| 13% | 73 | | | | X |
| 8% | 49 | | | X | |
| 74% | 430 | | | | |
| **Multiple administrative assignments** | | | | | |
| 5% | 31 | | | X | X |
| 5% | 30 | | X | X | |
| 4.4% | 26 | X | X | X | X |
| 4% | 25 | X | X | | |
| 2.2% | 13 | X | X | X | |
| 2.2% | 13 | X | | | X |
| 2% | 11 | | X | X | X |
| 0.7% | 4 | X | X | | X |
| 0.4% | 3 | X | | X | |
| 26% | 156 | | | | |
| *includes four double counts for superintendents who serve two communities | | | | | |

Projecting from reported numbers, there are 818 superintendent and principal "position assignments." Nearly three-fourths of the principals and superintendents (430) report a single

assignment – as superintendent or principal of one school. The other 156 administrators fill 388 positions, almost half the total. Districts need qualified administrators for principal positions in each school except the smallest ones, and many of those positions are part-time. In many instances administrators also serve in other positions, including teacher, counselor, and athletic director.

**Retirement:** Nearly half the current superintendents and principals plan to retire within the next 5 years – 51% of the males and 40% of the females. That is a higher proportion than for those who are qualified but not employed as administrators – 35% of the males and 29% of the females. Table 6 provides retirement information from administrators and those who are qualified but not employed as administrators.

The average number of years in TRS is essentially the same for females in both groups, despite the fact that the current female administrators are older and more plan to retire in the next five years. Although both males and females expect to work as administrators for 9.1 more years, the females have fewer years in the system. The females appear to be ready to retire with fewer than 30 years in TRS. Males appear to anticipate about 30 years. That may indicate current female administrators have done more "stopping out" in their careers than the other groups.

The male qualified personnel who are currently employed as teachers have more years in TRS than the male principals and superintendents, and as a group they are older. They also anticipate more years until retirement than the current superintendents and principals who are younger and have fewer years in TRS. Perhaps that indicates more satisfaction with their current positions or different plans after retirement.

Table 6
Retirement 2001-2002

| Retirement | - - - Current - - - | | | - - - Qualified - - - | | |
|---|---|---|---|---|---|---|
|  | All | Male | Female | All | Male | Female |
| **Years in system** | | | | | | |
| average years in TRS | 19.9 yrs | 20.4yrs | 18.7 yrs | 21.0yrs | 23.1yrs | 18.8 yrs |
| years left as administrator | 9.1 yrs | 9.1 yrs | 9.2 yrs | -- | -- | -- |
| **Years to retirement** | | | | | | |
| less than 2 years | 19% | 21% | 13% | 15% | 19% | 12% |
| 3 through 5 years | 29% | 30% | 27% | 17% | 16% | 17% |
| 6 through 10 years | 25% | 23% | 31% | 35% | 35% | 35% |
| more than 10 years | 25% | 24% | 28% | 32% | 28% | 36% |
| just retired | 1% | 1% | 1% | 1% | 3% | 0% |
| **Plans after retirement** (duplicated) | | | | | | |
| not work | 26% | 24% | 31% | 26% | 25% | 29% |
| work in the private sector | 34% | 35% | 31% | 42% | 44% | 40% |
| work part-time in education in MT | 25% | 23% | 27% | 23% | 21% | 27% |
| work out-of-state as teacher or administrator | 44% | 49% | 33% | 33% | 38% | 33% |
| other | 5% | 4% | 8% | 2% | 3% | 1% |
| **Other factors** | | | | | | |
| had retired and now returned | 7% | 9% | 4% | -- | -- | -- |
| have been administrators and returned to teaching | -- | -- | -- | 7% | 4% | 10% |

Both groups were asked what they plan to do after retirement and to check all options that applied. About one-fourth of both groups indicated that they are considering staying in Montana after retirement and continuing to work part time in education. However, nearly one-half of the males and

one-third of the females who are currently administrators indicate they will consider leaving Montana to work as teachers or school administrators. A little more than one-fourth of both groups would consider not working at all (many indicated that hunting and fishing was on their agenda). Over one-third are considering working in the private sector after retirement. Most of the "other" options listed in Table 6 included politics, college teaching, consulting, and working in private schools.

Table 6 also lists other factors which indicate that several of the current administrators were retired but have come back to work in the schools – 9% of the males and 4% of the females. In addition, several of those qualified as administrators but not employed in that capacity were once administrators but returned to teaching – 4% of the males and 10% of the females.

Current administrators and those qualified but not employed as administrators made many additional comments throughout the survey. The most prevalent comments dealt with frustrations with low retirement income and lack of benefits. They also commented on their restricted ability to work in education in Montana after retirement. Many of their remarks were followed by statements of intent to leave Montana to work out of state. Wide ranges of sentiments were expressed in the comments, ranging from: "I love my job. At times it can be frustrating because of paperwork, but education administration is a great career," to "Montana is the last place, rather than the last best place. I'm going out of state to earn decent retirement and benefits."

## Job Responsibilities and Preparation

The board chairs rate their superintendents as generally well prepared in all listed areas. The lowest rating was in assessment and evaluation, an area that is in the forefront of current school improvement and federal legislative efforts. There is very little difference between items in the overall ratings. However, the chairs of boards of the larger districts rate the preparation of their superintendents higher in all areas than the chairs of the smaller districts. Since superintendents in the larger districts have access to other staff and resources for expertise, it would seem that the superintendents in the smaller districts are the ones who need more in-depth preparation in all areas.

**Preparation of Superintendents:** The board chairs rated superintendents as moderately to highly prepared in all listed areas, with ratings that ranged from 2.7 to 3.1 out of a possible 4. Table 7 indicates that board chairs of the larger districts rate the preparation level of their superintendents higher in all instances than those from the smaller districts.

Table 7
Preparation of Superintendents – Board Chairs' Perception

| Preparation area | Preparation rating (1 low to 4 high) | | |
| --- | --- | --- | --- |
| | Statewide | Larger districts | Smaller districts |
| 1.  Finances and budget | 3.0 | 3.3 | 2.9 |
| 2.  Facilities planning and management | 3.0 | 3.4 | 2.8 |
| 3.  Curriculum and instructional leadership | 3.0 | 3.1 | 3.0 |
| 4.  Labor relations/collective bargaining | 2.8 | 2.9 | 2.8 |
| 5.  Legal issues/school law | 3.1 | 3.2 | 2.9 |
| 6.  Technology integration | 3.0 | 3.2 | 2.9 |
| 7.  Community relations | 3.0 | 3.1 | 2.9 |
| 8.  Staff relations | 3.0 | 3.1 | 2.9 |
| 9.  Leadership and change strategies | 2.9 | 3.1 | 2.8 |
| 10. Assessment/evaluation | 2.7 | 2.8 | 2.6 |

Two preparation areas had major differences in the ratings for larger and smaller districts – facilities planning and management, and finances and budget. Those are rated by chairs in the larger districts as the highest in level of preparation. Only three areas were rated below the 3.0 level.

**Preparation of superintendents – board chairs' perspective statewide**
<u>Only areas rated below 3.0 (from 2.7 to 2.9)</u>
- Leadership and change strategies
- Labor relations and collective bargaining
- Assessment and evaluation

In the 1999 MSBA survey the board chairs also indicated they felt superintendents were well prepared. Most preparation areas were rated in the same order as the recent survey.

## Recruiting and Retaining Administrators

Both the current administrators and those qualified to be administrators, from large and small districts, male and female, in all areas of the state, agreed very strongly on factors that would make them stay with the jobs longer and make the jobs more attractive to prospective applicants. Higher salary and better retirement benefits were rated the highest. But they also want more time to focus on instructional matters. They agreed on the duties that they would most like assigned to someone else in order to reduce their workloads. Two of the areas they identified – federal programs and paperwork – include many new and complex requirements.

It appears that at least two-thirds of the 298 individuals qualified as administrators do intend to become administrators in the future. Family considerations and satisfaction with current positions are the main reasons they have not taken jobs as administrators.

**Changes to the Job:** The most agreed-upon responses in the survey – by gender, MASS region, and size category – were from superintendents and principals when rating changes that might make their jobs more satisfying and attractive to applicants. The range of difference in ratings between any of the comparison groups was from 0.2 to 0.6.

The most consistent ratings across all examined categories were higher salary and better retirement benefits. The least consistent rating was also the lowest rating – for expanding internship programs. That item produced the widest rating gap, which was between the Central and Hi-line MASS regions. They rated expanded internship programs at 2.5 and 1.9, respectively.

**Administrators and those qualified as administrators**
**Ratings of factors to attract and retain candidates**

| <u>Highest rating (3.2 to 3.7)</u> | <u>Moderate rating (2.5 to 3.0)</u> | <u>Low rating (2.2 to 2.5)</u> |
|---|---|---|
| -Better retirement benefits** | -Strong administrative support network* | -Improved relationship with board |
| -Higher salary | -Expanded professional development | -Expanded internship program |
| -More time for instructional leadership | -Reduced responsibilities** | |
| | -Effective mentoring program* | |

*rated higher by those qualified as administrators
**rated higher by current administrators

The moderate ratings include three items that support professional growth: a support network, effective mentoring program, and expanded professional development. Although school board chairs consider internship programs valuable to meet their administrative needs, the administrators and

those qualified to be administrators are mixed in their ratings. About half who participated in internship programs rank them as very helpful (3 and 4) and half rank them as not helpful (1 and 2).

**Table 8**
**Changes to Administrator Jobs to Attract and Retain Personnel**

| | Rating | (1 not helpful to 4 very helpful) | |
|---|---|---|---|
| | Changes | Administrators | Qualified |
| 1. | Higher salary | 3.5 | 3.4 |
| 2. | Better retirement benefits | 3.7 | 3.4 |
| 3. | Reduced responsibilities by assigning some duties to other personnel | 2.8 | 2.5 |
| 4. | Expanded professional development opportunities | 2.8 | 2.8 |
| 5. | More time for instructional leadership | 3.3 | 3.2 |
| 6. | An effective mentoring program | 2.6 | 3.0 |
| 7. | Improved relationship/role definition with board of trustees | 2.4 | 2.4 |
| 8. | A strong administrative support network | 2.9 | 3.1 |
| 9. | Expanded internship program | 2.2 | 2.5 |

Current administrators and those qualified to be administrators listed duties they would assign to someone else, if possible, in response to question 3 in Table 8.
The following responsibility areas were named several times by both groups, and in the same order of magnitude as listed. Several indicated they would welcome reassignment of any duty that lightened their load.

**Duties would prefer reassigned to reduce administrator workload**
1. Federal programs oversight - Title 1, special education, school foods
2. Discipline
3. Paperwork, data collection, reporting
4. Administrative trivia – attendance, repairs, cleanup, substitutes, maintenance, clerical
5. Supervision and evaluation (listed mostly by superintendents)
6. Student activities and athletic director
7. Curriculum/alignment activities/professional development

**Reasons for Not Being Employed as an Administrator:** Those who are qualified but not employed as administrators rated the influences they feel are contributing to their not being employed in administration. None were considered major influences but several were at the high moderate level. A few received ratings as minimal influences.

**Factors for not being currently employed as an administrator**

High moderate influence (2.5 to 2.8)
 -Family considerations
 -Current job was more satisfying
 -Would have to relocate to another district
 -Less contact/impact on students
 -Hiring process too political
 -Salary too low for responsibilities

Minimal influence (1.6 to 1.9)
 -Changed role with teachers – supervision
   and evaluations
 -Too close to retirement
 -Having to work closely with school board
   and other administrators

The male and female ratings were similar except that the strongest influences for males were that their current job was more satisfying and that they would lose individual contact with students. The

two strongest reasons for females were family considerations and being required to relocate. Table 9 lists the factors and ratings.

Table 9
Influences for Not Becoming an Administrator although Qualified

| | Factors | Rating (1 minor – 4 major) | | |
|---|---|---|---|---|
| | | Overall | Male | Female |
| 1. | Current job more satisfying | 2.7 | 2.9 | 2.5 |
| 2. | Less contact with and impact on students | 2.6 | 2.8 | 2.4 |
| 3. | The increase in required work time | 2.3 | 2.2 | 2.5 |
| 4. | The higher profile role with parents and public | 2.0 | 2.1 | 1.9 |
| 5. | Salary too low for increased responsibilities | 2.5 | 2.5 | 2.5 |
| 6. | Family considerations | 2.8 | 2.7 | 2.9 |
| 7. | Annual financial stresses | 2.1 | 2.2 | 2.0 |
| 8. | Would require relocation to another district | 2.7 | 2.7 | 2.7 |
| 9. | The changed role with teachers – to supervision | 1.9 | 2.0 | 1.8 |
| 10. | The hiring process is too political | 2.6 | 2.7 | 2.5 |
| 11. | Too much responsibility for too many things | 2.1 | 2.1 | 2.0 |
| 12. | Having to work closely with a school board and other administrators | 1.6 | 1.8 | 1.4 |
| 13. | State and federal paperwork and requirements | 2.0 | 2.2 | 1.8 |
| 14. | Too close to retirement | 1.8 | 1.9 | 1.7 |

About half of those who are qualified to be administrators but not employed in those positions made individual comments on their surveys. Some were brief; some covered two pages. Although many of their ratings were moderate, nearly all their comments provided strong statements of their position or of their concerns.

- Nearly half of the comments indicated disillusion with the structures of schools – from systems more focused on athletics, meetings, and trivia rather than on academics, to feeling they do not wish to work with current administrators who are poor examples of leadership.
- Almost as many voices criticized the hiring process as too political, an old boys' network, needing to know the right people, a humiliating experience (especially when remaining within the district), and knowing positions were informally filled before publicly listed.
- A third strong message was discouragement because of lack of state support, low pay, and overwhelming duties and demands that make it difficult to do the job well.
- Several more referenced difficulties for women – family obligations, time demands on mothers, and women's need for professional support networks.
- Others voiced concerns that they are place-committed (because of family or personal needs or desires) and haven't been able to obtain local positions.
- There were a few individual references to bias – against white women, Native American women, women in general, and white men.

Despite the strong opinions held by this group, it appears that most of them intend to be school administrators in the future. Over two-thirds indicated they are currently applying or will apply for administrative positions. The average number of years until they apply is less than two years. About 17% are currently involved in the application process, and 11% have accepted administrative positions for next year. Of the qualified administrators who are not employed, only 23% indicated they had never applied for an administrative position. Most of them indicated that they do not intend to apply in the future. The remainder indicated that they had applied at some time. Twenty percent (20%) indicated that they have been offered administrative positions, and half of them (mostly males) turned down the offers.

## Becoming an Administrator

Montana educators appear to follow a somewhat standard path to school administration. They were teachers for several years and then moved into administration. Those who became superintendents spent fewer years teaching than those who were employed as principals. Only a few indicated detours along the way.

Internship programs have delivered administrative training in a manner that has helped districts meet administrative needs. Eleven percent (11%) of current administrators participated in internships as well as 30% of those who are qualified but not employed as administrators. Board chairs consider internships as extremely helpful in meeting their needs. Administrators and those who are qualified to be administrators expressed mixed opinions concerning internship programs.

School superintendents and principals rated the opportunity for leadership and contribution to education as the top reasons for becoming school administrators. Those who are qualified but not employed as administrators rated expanded career options first and leadership second. The least important reasons for both groups were to gain professional recognition and to earn recertification units.

**Paths to Becoming an Administrator:** The responses to the questions about former positions were difficult to analyze. Several reversed the order of experience, some listed only the current position, and others lumped several items together. Some information was useful, however.

Ninety-five percent (95%) of those who are qualified to be administrators but not currently employed in those positions were teachers. They had been in their current positions for an average of 15.1 years. Most did not specify the teaching area or level. Of the other 5%, half were special education directors or in special services, counselors, athletic directors, or migrant program directors.

On average, the superintendents have been in their current positions for 6.2 years, males averaging 6.8 years and females 3.0 years. The path for administrators seems somewhat standard. Most were teachers for a few years and then became principals. The majority of the superintendents taught for fewer than 10 years, while many of the principals were teachers for twice as long before becoming administrators. Only a few individuals identified unusual paths to administration. Those paths included having been lawyers, grocery store owners, military officers, or college teachers. Several of the women began their education careers as aides or paraprofessionals.

**Internships:** Another path to administration came through participation in the internship programs. One-third of board chairs indicated that their districts had participated in internship programs, and all who had participated felt it helped them meet administrative needs. Overall, 89% of the board chairs believed that internships assist districts to meet administrative needs.

A higher portion of women than men have participated in the internship programs and a higher proportion of the women considered the program to be helpful in addressing the shortages. About 11% of current administrators participated in the program. Of those who are qualified but not employed as administrators, a higher portion participated – about 30%. Table 10 provides internship information by gender.

Although the board chairs consider internship programs to be very helpful to them, the participants are less certain of the value. Less than half of those who have participated indicated that an expanded internship program would be helpful (rated 3 or 4), while the majority felt it would make little difference (rated 1 or 2). Overall, only one-third of all current administrators felt that expanding the program would be helpful (rated 3 or 4). Of the qualified administrators, one-third of the men and

half the women rated an expanded intern program as helpful (at 3 or 4). Overall ratings are included in Table 8, number 9.

**Table 10**

**Internship Demographics**

| Internship | - - Current - - | | - - Qualified - - | |
|---|---|---|---|---|
| | Male | Female | Male | Female |
| Number who participated | 34 | 31 | 33 | 56 |
| % participating in internship program | 8% | 18% | 22% | 39% |
| - superintendents participated | 5% | 12% | -- | -- |
| - principals (no supt. role) participated | 10% | 20% | -- | -- |

**Reasons to Become Certified as an Administrator:** Both the current administrators and those qualified but not employed as administrators gave similar ratings to reasons for earning administrators' credentials. Most of the ratings were similar for both groups and for both genders. Table 11 lists the ratings for both groups.

**Reasons to become an administrator**

Strong reasons (3.5 to 3.9)
   -Assume a greater leadership role
   -Expand career options
   -Make a greater contribution to education
   -Assist and support teachers' efforts
   -Increase salary

Minor reasons (1.4 to 2.3)
   -Professional recognition
   -Recertification units

The survey provided the option to add additional reasons. Rated as strong "other" reasons by several current administrators were being recruited or requested to become administrators and making a difference with kids.

**Table 11**

**Reasons for Becoming a School Administrator**

| | Reasons | Rating (1 not a reason-4 strong reason) | |
|---|---|---|---|
| | | Current administrators | Qualified as administrators |
| 1. | Expand career options | 3.5 | 3.8 |
| 2. | Assume a greater leadership role | 3.6 | 3.5 |
| 3. | Increase salary | 3.4 | 3.5 |
| 4. | Gain professional recognition | 2.2 | 2.3 |
| 5. | Assist and support teachers' efforts | 3.5 | 3.4 |
| 6. | Make a greater contribution to education | 3.6 | 3.4 |
| 7. | Earn recertification units | 1.4 | 1.9 |
| 8. | Engage in more challenging work | 3.1 | 2.8 |

## Job Responsibilities

Perceptions of the satisfaction and difficulties of administrative jobs are very different when viewed from inside and outside the jobs. Both the administrators and those qualified to be administrators indicated a high level of satisfaction with their current jobs. However, the perception of the satisfaction level for responsibilities as an administrator for those qualified but not administrators was higher for every item than the satisfaction level experienced by those who are already administrators.

**Job Satisfaction:** Table 12 lists three ratings columns. Those who are qualified to be administrators rated their current job satisfaction and the satisfaction they would anticipate if they were administrators. The current administrators rated their level of satisfaction with their current positions.

**Table 12**
**Job Responsibilities and Satisfaction**

| | Satisfaction rating (1 low – 4 high) | | |
| | Qualified as administrators | | Current administrators |
| Responsibilities | | | |
| Management | Present job | if administrator | as administrator |
| 1.  Managing student discipline | 3.2 | 3.0 | 2.8 |
| 2.  Managing budgets | -- | 3.0 | 2.9 |
| 3.  Managing buildings | -- | 3.3 | 3.2 |
| 4.  Completing paperwork and reporting requirements | 2.9 | 2.7 | 2.2 |
| 5.  Complying with federal program requirements | 2.7 | 2.7 | 2.0 |
| 6.  Working with parents and public | 3.4 | 3.4 | 3.4 |
| 7.  Working with community groups/ agencies | 3.1 | 3.4 | 3.2 |
| 8.  Working as part of a team | 3.4 | 3.7 | 3.5 |
| Instructional leadership | | | |
| 9.  Using and integrating technology | 3.1 | 3.4 | 3.1 |
| 10.  Maintaining atmosphere for learning | 3.7 | 3.7 | 3.7 |
| 11.  Aligning instruction/ assessment/ standards | 3.0 | 3.2 | 2.7 |
| 12.  Implementing action plans | 2.8 | 3.2 | 2.7 |
| 13.  Using assessment and data to revise programs | 2.9 | 3.3 | 2.9 |
| Supervision and personnel | | | |
| 14.  Hiring/managing non-professional staff | -- | 3.2 | 2.9 |
| 15.  Supervising/evaluating professional staff | -- | 3.4 | 3.3 |
| 16.  Providing for professional development | -- | 3.6 | 3.3 |
| 17.  Maintaining positive working relation-ships with and among staff | 3.4 | 3.7 | 3.6 |
| 18.  Collective bargaining/labor relations | 2.4 | 2.6 | 2.1 |

The qualified administrators who are currently employed as teachers in the schools indicated a high degree of satisfaction with their current jobs, but higher levels of satisfaction were anticipated for administrative positions. For every item, the administrative satisfaction ratings by the current administrators were lower than the ratings by those who were not yet administrators.

**Highest and lowest ratings of job satisfaction from Table 12**

Highest satisfaction
-Maintaining a positive atmosphere for learning
-Maintaining positive working relationships with and among staff
-Working as part of a team
-Providing professional opportunities for staff

Lowest satisfaction
-Completing paperwork and reporting requirements
-Complying with federal program requirements
-Collective bargaining/labor relations

14

Those who are not working as administrators anticipate that their satisfaction level with the lowest-rated responsibility, collective bargaining/labor relations, will increase if they become administrators, from 2.4 to 2.6. However, the current administrators' satisfaction rating with collective bargaining/labor relations is 2.1 – lower than either of the other ratings. The current administrators rate complying with federal program requirements even lower at 2.0.

For both groups, males and females had similar ratings for the majority of the responsibilities. Only a few showed significant differences. The widest gaps between ratings were in meeting federal requirements and in aligning assessment, curriculum, and standards. The females find more satisfaction with meeting federal requirements and aligning curriculum, assessment, and standards than their male counterparts.


## Perspectives of Board Chairs

Almost 90% of school boards have hired superintendents or principals in the past five years and nearly 80% expect to hire in the next five years. Considering the continuous nature of hiring and the fact that one-third of the board chairs have only one year or less experience as chair, it would seem increasingly important that school boards have expertise or available training for the hiring process.

Although the turnover of administrators is high overall, the board chairs indicated a moderate level of concern about hiring difficulties. Their major concern was with the small pool of applicants. The board chairs in the East have more board experience and appear less likely than those in the West and Center to have recently hired or expect to hire administrators.

The board chairs' perspective on the difficulties encountered by school administrators is quite different from the difficulties identified by the administrators. Their ratings of various factors differ widely. They did agree that the most difficulty is encountered because of inadequate funding, but the levels of difficulty were far apart. Both groups also listed conflict with the board as one of the "other" difficulties they encounter.

The hiring incentives are similar to those used in 1999, but a higher portion of districts now use them. Most incentives are financial. Signing and moving bonuses and a planned process for recruitment have become common incentives.

**Board Chair Demographics:** Table 13 indicates that, on the average, board chairs had 6.6 years of experience on the board, and over 80% had been on the board for more than two years. They had held their positions as chairs of the boards for about half the time that they'd been on the board, an average of 3.3 years. One-third of them had been chair for one year or less. The board chairs in the East had the most overall experience  (7.2 years) and 96% had served on the board for more than two years.

The 1999 MSBA survey indicated almost exactly the same overall experience – 6.7 years on the board and 3.4 years as chair.

An overwhelming majority of boards hired administrators in the past five years and expect to hire in the next five years. Overall more than 88% hired administrators in the past five years and over 80% expect to hire in the next five years. The hiring percentages are lower in the East – 78% hired in the past five years and 73% expect to hire in the next five. The East is also the region where the board chairs have more longevity on the board than the other regions.

**Table 13**
**Demographics of Board Chairs**

| Experience | Statewide | West | Center | East |
|---|---|---|---|---|
| Years as board member | 6.6 years | 6.3 years | 6.4 years | 7.2 years |
| -more than 2 years | 86% | 79% | 81% | 96% |
| Years as chair | 3.3 years | 3.0 years | 3.4 years | 2.9 years |
| -more than 1 year | 64% | 67% | 63% | 61% |
| | | | | |
| Hired administrator in last 5 years | 88% | 88% | 96% | 78% |
| Expect to hire in next 5 years | 79% | 80% | 88% | 73% |

**Difficulties Encountered in Administrative Positions:** Board chairs and current administrators indicate differing perspectives on the major difficulties encountered by administrators. Both the administrators and the board chairs identified inadequate school funding as the greatest difficulty. However, the board chairs' ratings were considerably lower (2.6) than the administrators (3.6). The chairs' second and third highest ratings were among the lowest ratings by the administrators. Table 14 shows that large differences exist in the ratings of the two groups – a gap of 0.9 to 1.1 for all items.

**Table 14**
**Difficulties Related to Administrative Positions – Current Administrators, Board Chairs**

| | Rating | (1 not difficult to 4 very difficult) | |
|---|---|---|---|
| | Difficulties | Administrators | Board Chairs |
| 1. | Working hours/time demands | 3.1 | 2.2 |
| 2. | Inadequate school funding | 3.6 | 2.6 |
| 3. | Increasing intensity of student needs | 3.3 | 2.2 |
| 4. | Personal/professional isolation | 2.6 | 2.1 |
| 5. | Conflicts with parents and community members | 2.2 | 2.3 |
| 6. | Strained relationships with district teachers and administrators | 2.0 | 2.3 |
| 7. | Multiple responsibilities and skills required | 2.6 | 2.2 |
| 8. | Expanded state and federal program requirements | 3.2 | 2.2 |
| 9. | Administrators' evaluation process | 2.0 | 1.7 |

Board chairs indicated that they do not consider many of the items listed in Table 14 as causing a high degree of difficulty in hiring administrators. The highest rating is a 2.7 for a small pool of applicants. Three items were rated less than 2.0.

**Highest rated difficulties encountered in administrative positions**

Administrators  (rated 3.1 to 3.6)
-Inadequate school funding
-Increasing intensity of student needs
-Expanded state and federal requirements
-Working hours/time demands

Board chairs (rated 2.3 to 2.6)
-Inadequate school funding
-Strained relationships with teachers
-Conflicts with parents and community

Both groups identified factors other than those listed. The "other" factor most often listed by both groups was conflict between administrators and the board of trustees. Perhaps the major gap in their perceptions of job difficulties contributes to that conflict.

**Difficulties Hiring Administrators:** The board chairs did not indicate a great degree of difficulty for any of the items that cause problems when hiring administrators. Their highest difficulty rating was 2.7 for a small pool of applicants. Three items were rated less than 2.0. The larger and smaller district ratings were similar to the overall ratings. However, ratings for the 1E 1H largest size category were quite different from the others. The small number of board chairs in this category has little impact on the state averages, but their ratings are representative of this size category – five of the seven board chairs responded. They rated the difficulty level for a small pool of applicants at 3.8, an extremely high rating.

The analysis by geographic regions indicated the Center and East had more difficulty with a small pool of applicants than the West. The East did not appear to have many problems with candidates wanting a higher salary than was offered, but the other regions found that problematic. The East also identified lack of opportunities for applicant's family members as a difficulty.

**Table 15**
**Difficulties Hiring Administrators – Board Chairs**

| | Difficulties | Difficulty rating (1 little – 4 great) | | | | |
|---|---|---|---|---|---|---|
| | | Statewide | 1E 1H | West | Center | East |
| 1. | Small pool of applicants | 2.7 | 3.8 | 2.5 | 2.9 | 3.0 |
| 2. | Unqualified applicants | 2.4 | 3.0 | 2.3 | 2.6 | 2.4 |
| 3. | Applicants did not have appropriate Montana certification | 1.9 | 2.6 | 2.1 | 1.8 | 1.9 |
| 4. | Lack of previous administrative experience | 2.5 | 2.4 | 2.5 | 2.6 | 2.7 |
| 5. | Candidates wanted higher salary than offered | 2.4 | 3.0 | 2.5 | 2.8 | 1.9 |
| 6. | Applicants did not wish to live in community | 1.8 | 1.2 | 1.8 | 1.6 | 1.9 |
| 7. | Local qualified person chose not to apply | 1.7 | 2.6 | 1.9 | 1.6 | 1.6 |
| 8. | Opportunities not available for applicant's family members | 2.3 | 2.0 | 2.2 | 2.2 | 2.6 |

**Incentives to recruit and retain administrators:** The common incentives used by school boards to attract and keep school administrators are mostly financial and haven't changed much over the past few years. Three of the most popular incentives in this study were the same ones identified in the 1999 MSBA survey.

> **Most used school board incentives to recruit and retain administrators in 2002**
> -Willingness to negotiate salary and benefits
> -Money/support for professional development activities
> -Dues paid for professional organizations
> -Encouragement of local personnel to apply

Missing from the top four in the 1999 study was encouragement of local personnel to apply. Offering a competitive salary was one of the top four in 1999 but not in 2002.

The least used incentives in both studies were bonuses for longevity and for quality performance. All incentives that were listed for both studies are now used by a higher portion of districts than in 1999. Signing and moving bonuses and a planned process for recruitment have become common incentives. Table 16 indicates the percent of districts using the listed strategies.

**Table 16**
**Incentives for Recruiting and Retaining Administrators – Board Chairs**

| | Incentives/strategies | Used in past several years | |
|---|---|---|---|
| | | Yes | No |
| 1. | Planned process for recruitment | 58% | 42% |
| 2. | Encouragement of qualified district personnel to apply | 78% | 22% |
| 3. | A formal mentor program for new administrators | 15% | 85% |
| 4. | Housing or housing subsidy | 31% | 69% |
| 5. | Signing or moving bonuses | 41% | 59% |
| 6. | Expanded insurance options | 45% | 55% |
| 7. | Car or transportation allowance | 35% | 65% |
| 8. | Money and/or support to attend professional development activities | 92% | 8% |
| 9. | Paid annuity, IRA, or other type retirement | 38% | 62% |
| 10. | Dues paid for professional associations | 85% | 15% |
| 11. | Longevity bonuses | 17% | 83% |
| 12. | Bonuses for quality performance | 11% | 89% |
| 13. | Willingness to negotiate salary and benefits | 93% | 7% |

## Research Observations

Adequate funding for schools and salaries would likely provide relief for many of the issues related to teacher and administrative shortages in Montana schools. However, this study indicates that several of the issues require resourcefulness, cooperation, policy changes, and old-fashioned persistence

Several challenges emerged throughout the study, as it became clear that a major exodus of school administrators is underway. No single entity can resolve the issues. The Montana community will have to address the challenges together.

1. Work to improve benefits from teachers' retirement in exchange for more time in the system, in order to both attract new candidates and retain the experienced ones. Retiring at half or less of a former salary is not an encouraging prospect.

2. Design more cross-structural support and cooperation across agencies, teacher education programs, professional organizations, and other existing entities for professional development, mentoring, and professional support networks specifically designed for school leaders. Many efforts are underway and lots of planning is going on, but a few years from now will be much too late to put something in place.

3. Examine and revise internship programs to maximize the benefits they provide. Board chairs find the programs valuable for their needs. Administrators and those who have participated in the programs have mixed feelings about their value.

4. Build structures for sharing administrative expertise to help alleviate the loads that administrators carry. We have special education co-ops and curriculum co-ops. We need some form of administrative co-ops.

5. Develop incentives and strategies for recruitment and retention that are targeted to information obtained from this survey: administrative reasons for becoming administrators (leadership roles, contributions to education), changes that make the job more attractive (lighten the load, more time for instructional leadership), identified job difficulties (better support with federal programs and reporting requirements), and barriers for those who don't apply for the jobs (family obligations, place-committed, enjoy current jobs better).

6.  Make certain that training and expertise in hiring procedures and practices are available to school boards of trustees. Many administrators' positions need to be filled.  Board members are volunteers who are placed in positions that require professional hiring and interviewing strategies to attract applicants and hire the best candidates.

7.  Enable school boards and administrators to develop more common perspectives on the difficulties of their roles. School boards need a better understanding of what administrators identify as real problems with their jobs. The administrators may not have a good understanding of the problems boards face either, given the different perspectives they have about the values of the internship programs.

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# Appendices

Size ☐

# Education Administrator Survey

MASS ☐

With the assistance of a Wallace-Readers Digest grant, a coalition of Montana education agencies and organizations are examining legislation, policies, and practices that impact the recruitment and retention of school leaders. The groups include the Board of Public Education, OPI, The Governor's Office, legislators, SAM, MSBA, MREA, MEA-MFT, and others. Participation in this survey will provide key policymakers and legislators with your perspective on the complexity of the Montana administrative shortages.

Your response is very important.  Please take a few minutes to complete the survey.

---

**DIRECTIONS**                                   **Please Return by May 24, 2002**

                                                     (or as soon as possible)

1. Please read and answer each question.
2. **All responses are anonymous.**  The identifying code designates school size and administrative region only.  No individual or district will be identified.
3. Please complete and return questionnaire to:   **Dori Nielson**
                                                     **502 Livingston Ave.**
                                                   **Missoula, MT 59801**

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*check all that apply*

**Position:**   ☐ Superintendent      ☐ Principal - Elem.
Current                                ☐ Principal - Middle
                                      ☐ Principal - H. S.

☐ Participating or Participated in Intern Program

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**Education Work Experience:**

What career path did you take to become a school administrator?  Please list the education positions you have held, beginning with the most recent and working backwards.

| Position held: | Number of Years | Part- or full-time | |
|---|---|---|---|
| _____ | _____ | _____ | (most recent) |
| _____ | _____ | _____ | |
| _____ | _____ | _____ | |
| _____ | _____ | _____ | |
| _____ | _____ | _____ | |

                                                                    **Number of Years**

How many more years do you expect to be an administrator in Montana schools?      _____

---

**Demographics**     *check one in each category*

**Gender:**   ☐ male                         **Marital Status:**   ☐ married
               ☐ female                                         ☐ single

**Ethnicity:**   ☐ Asian/Pacific Islander     **Dependent children:**   ☐ yes
               ☐ American Indian                                     ☐ no
               ☐ Black
               ☐ Hispanic                     **Highest degree:**   ☐ Bachelor's
               ☐ White                                         ☐ Master's/Specialist
                                                        ☐ Doctorate

**Age:**   ☐ under 40
         ☐ 40 through 49
         ☐ 50 through 60
         ☐ over 60

<u>**Reasons for Earning Administrative Certification**</u>            *circle response*
                                                             **not a reason---strong reason**

| | | |
|---|---|---|
| 1 Expand career options………………………………………………………………. | 1 2 3 4 |
| 2 Assume a greater leadership role…………………………………………………. | 1 2 3 4 |
| 3 Increase salary……………………………………………………………………. | 1 2 3 4 |
| 4 Gain professional recognition……………………………………………………. | 1 2 3 4 |
| 5 Assist and support teachers' efforts……………………………………………. | 1 2 3 4 |
| 6 Make a greater contribution to education………………………………………… | 1 2 3 4 |
| 7 Earn recertification units…………………………………………………………. | 1 2 3 4 |
| 8 Engage in more challenging work………………………………………………… | 1 2 3 4 |
| 9 Other:_____ | 1 2 3 4 |
| 10 Other:_____ | 1 2 3 4 |

<u>**Responsibilities**</u>   express the degree of satisfaction with these areas        *circle response*
                                                                    **satisfaction**
                                                                    **low…high**

| | | |
|---|---|---|
| 1 Managing student discipline……………………………………………………… | 1 2 3 4 |
| 2 Managing budgets………………………………………………………………… | 1 2 3 4 |
| 3 Managing buildings………………………………………………………………… | 1 2 3 4 |
| 4 Completing paperwork and reporting requirements……………………………… | 1 2 3 4 |
| 5 Complying with federal program requirements………………………………… | 1 2 3 4 |
| 6 Working with parents and the public……………………………………………. | 1 2 3 4 |
| 7 Working with community groups and agencies………………………………… | 1 2 3 4 |
| 8 Working as part of an administrative team……………………………………… | 1 2 3 4 |
| 9 Using and integrating technology for student learning………………………… | 1 2 3 4 |
| 10 Maintaining an atmosphere that supports student learning…………………… | 1 2 3 4 |
| 11 Aligning instruction and assessment with state content standards…………… | 1 2 3 4 |
| 12 Implementing school action plans (ex: fire drills, crisis plans)……….………… | 1 2 3 4 |
| 13 Using assessment and other data to structure and revise programs………… | 1 2 3 4 |
| 14 Hiring and managing non-professional staff…………………………………… | 1 2 3 4 |
| 15 Supervising and evaluating professional staff………………………………… | 1 2 3 4 |
| 16 Providing opportunities for professional development for staff……………… | 1 2 3 4 |
| 17 Building and maintaining positive working relationships with/among staff…….…… | 1 2 3 4 |
| 18 Collective bargaining/labor relations…………………………………………… | 1 2 3 4 |
| 19 Other:_____ | 1 2 3 4 |
| 20 Other:_____ | 1 2 3 4 |

<u>**Difficulties Encountered:**</u>   Please indicate the degree of difficulty you have experienced with the following, as they relate to your administrative position.          *circle response*
                                                  **little difficulty---great difficulty**

| | | |
|---|---|---|
| 1 Working hours/time demands……………………………………………………. | 1 2 3 4 |
| 2 Inadequate school funding………………………………………………………. | 1 2 3 4 |
| 3 Increasing intensity of student needs…………………………………………… | 1 2 3 4 |
| 4 Personal/professional isolation…………………………………………………. | 1 2 3 4 |
| 5 Conflicts with parents and community members……………………………… | 1 2 3 4 |
| 6 Strained relationships with district teachers and administrators……………….. | 1 2 3 4 |
| 7 Multiple responsibilities and skills required…………………………………… | 1 2 3 4 |
| 8 Expanded state and federal program requirements…………………………… | 1 2 3 4 |
| 9 Administrators' evaluation process and instrument used……………………… | 1 2 3 4 |
| 10 Other:_____ | 1 2 3 4 |

**Changing the Job:** What changes to your job might make it more satisfying
and perhaps attract more applicants? *circle response*
**not helpful---very helpful**

| | | |
|---|---|---|
| 1 Higher salary…………………………………………………………….. | 1 2 3 4 |
| 2 Better retirement benefits……………………………………………….. | 1 2 3 4 |
| 3 Reduced responsibilities by assigning some duties to other personnel…………….. | 1 2 3 4 |
| Which duties?_____ | |
| 4 Expanded professional development opportunities………………………………….. | 1 2 3 4 |
| 5 More time for instructional leadership……………………………………………….. | 1 2 3 4 |
| 6 An effective mentoring program……………………………………………………….. | 1 2 3 4 |
| 7 Improved relationship/role definition with Board of Trustees…………………………. | 1 2 3 4 |
| 8 A strong administrative support network…………………………………………….. | 1 2 3 4 |
| 9 Expanded internship program……………………………………………………….. | 1 2 3 4 |
| 10 Other:_____ | 1 2 3 4 |

**Administrative position hirings:** From your experience, what problems were encountered when hiring
school administrators in districts in which you have worked? *circle response*
**not a problem---major problem**

| | | |
|---|---|---|
| 1 Small pool of applicants……………………………………………………… | 1 2 3 4 |
| 2 Unqualified applicants…………………………………………………………… | 1 2 3 4 |
| 3 Applicants did not have appropriate Montana certification……………………………. | 1 2 3 4 |
| 4 Lack of previous administrative experience……………………………………………. | 1 2 3 4 |
| 5 Candidates wanted higher salary than offered………………………………………… | 1 2 3 4 |
| 6 Applicants did not wish to live in community…………………………………………… | 1 2 3 4 |
| 7 Local qualified personnel chose not to apply…………………………………………… | 1 2 3 4 |
| 8 Opportunities not available for applicant's family members…………………………… | 1 2 3 4 |
| 9 Other:_____ | 1 2 3 4 |

Comments:_____

_____

**Retirement considerations:** **Number of years**

1 Years of service in the Teachers' Retirement System (TRS)? _____

2 Have you retired from TRS, but are now back in administrative work? ____Yes ____No

3 When do you expect to retire from school administration in Montana? c*heck one*

| | | | |
|---|---|---|---|
| ☐ | Within 2 years | ☐ | Within 6 to 10 years |
| ☐ | Within 3 to 5 years | ☐ | After more than 10 years |

4 After retirement from school administration in Montana, what are your plans? c*heck all that apply*

☐ Not work on a regular basis
☐ Work in the private sector
☐ Take an administrative job out-of-state
☐ Take a teaching job out-of-state
☐ Work part-time in education in-state (up to portion allowed while on TRS)
☐ Other:_____

**Other comments:** _____

_____

_____

**Thank you. Questions? Call Dori at 406-721-2683.**

# Survey -- Individuals Qualified as a School
# Administrators but not Employed in That Capacity

Size [ ]

MASS [ ]

With the assistance of a Wallace-Readers Digest grant, a coalition of Montana education agencies and organizations are examining legislation, policies, and practices that impact the recruitment and retention of school leaders.  The groups include the Board of Public Education, OPI, The Governor's Office, legislators, SAM, MSBA, MREA, MEA-MFT, and others.  Your participation in this survey will provide key policymakers and legislators with your perspective on the complexity of the Montana administrative shortages.

Your response is very important.  Please take a few minutes to complete the survey.

---

**DIRECTIONS**                                          **Please Return by May 24, 2002**
                                                        (or as soon as possible)
  1. Please read and answer each question.
  2. **All responses are anonymous**.  The identifying code designates school size and
     administrative region only.  No individual or district will be identified.
  3. Please complete and return questionnaire to:    **Dori Nielson**
                                                       **502 Livingston Ave.**
                                                       **Missoula, MT 59801**

---

**Administrative**         *check all that apply*          for how many years?
**Certification:**
 Current        [ ] Superintendent              _____
                [ ] Principal - Elementary      _____              [ ] Participating or Participated
                [ ] Principal - grades 5 - 12   _____                  in Intern Program
                [ ] Principal - grades 7 - 12   _____
                [ ] Principal - K-12            _____

                [ ] Other:_____      _____

---

*check one in each category*

**Demographics**

**Gender:**      [ ] male              **Marital Status:**    [ ] married
                 [ ] female                                   [ ] single

**Ethnicity:**   [ ] Asian/Pacific Islander   **Dependent children:**   [ ] yes
                 [ ] American Indian                                     [ ] no
                 [ ] Black
                 [ ] Hispanic
                 [ ] White

**Age:**         [ ] under 40          **Highest degree:**    [ ] Bachelor's
                 [ ] 40 through 49                            [ ] Master's/Specialist
                 [ ] 50 through 60                            [ ] Doctorate
                 [ ] over 60

---

                                                        *circle response*
**Reasons for Earning Administrative Certification**    **not a reason---strong reason**
 1 Expand career options………………………………………………… 1 2 3 4
 2 Assume a greater leadership role…………………………………… 1 2 3 4
 3 Increase salary…………………………………………………………… 1 2 3 4
 4 Gain professional recognition……………………………………… 1 2 3 4
 5 Assist and support teachers' efforts……………………………… 1 2 3 4
 6 Make a greater contribution to education………………………… 1 2 3 4
 7 Earn recertification units…………………………………………… 1 2 3 4
 8 Engage in more challenging work……………………………….. 1 2 3 4
 9 Other:_____ 1 2 3 4
10 Other:_____ 1 2 3 4

**Education Work Experience:**

1 What career path did you follow on your way to becoming certified as a school administrator?
Please list the education positions you have held, beginning with the most recent.

| Position held: | Number years | Part- or full-time |
|---|---|---|
| _____ | _____ | _____ (most recent) |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

Yes No

2 Have you ever applied for an administrative position in a school district?
    - Were you offered the position for which you applied?
    - Did you turn down the position?

3 Do you plan to apply for an administrative position in the future?
    - How many years before you plan to apply? _____

**Responsibilities**

Several educational responsibilities are shared by teachers, specialists, and administrators. Please indicate your degree of satisfaction with your current job, and the satisfaction you would expect in an administrative position.

*circle response*

| | Current Job satisfaction low…….high | Expected in Administrative Job satisfaction low…….high |
|---|---|---|
| 1 Managing student discipline………………………………………………. | 1 2 3 4 | 1 2 3 4 |
| 2 Managing budgets……………………………………………………….. | | 1 2 3 4 |
| 3 Managing buildings……………………………………………………… | | 1 2 3 4 |
| 4 Completing paperwork and reporting requirements…………………… | 1 2 3 4 | 1 2 3 4 |
| 5 Complying with federal program requirements………………………… | 1 2 3 4 | 1 2 3 4 |
| 6 Working with parents and the public…………………………………… | 1 2 3 4 | 1 2 3 4 |
| 7 Working with community groups and agencies………………………… | 1 2 3 4 | 1 2 3 4 |
| 8 Working as part of a team……………………………………………… | 1 2 3 4 | 1 2 3 4 |
| 9 Using and integrating technology for student learning………………… | 1 2 3 4 | 1 2 3 4 |
| 10 Maintaining an atmosphere that supports student learning………………… | 1 2 3 4 | 1 2 3 4 |
| 11 Aligning instruction and assessment with state content standards……….. | 1 2 3 4 | 1 2 3 4 |
| 12 Implementing school action plans (ex: fire drills, crisis plans)……….……. | 1 2 3 4 | 1 2 3 4 |
| 13 Using assessment and other data to structure and revise programs………. | 1 2 3 4 | 1 2 3 4 |
| 14 Hiring and managing non-professional staff……………………………………. | | 1 2 3 4 |
| 15 Supervising and evaluating professional staff…………………………………... | | 1 2 3 4 |
| 16 Providing opportunities for professional development for staff…………………….. | | 1 2 3 4 |
| 17 Building and maintaining positive working relationships with/among staff…. | 1 2 3 4 | 1 2 3 4 |
| 18 Collective bargaining/labor relations………………………………………… | 1 2 3 4 | 1 2 3 4 |
| 19 Other:_____ | 1 2 3 4 | 1 2 3 4 |
| 20 Other:_____ | 1 2 3 4 | 1 2 3 4 |

**Influences That Have Kept you from Becoming an Administrator**

*circle response*
**influence**
**minor...major**

| | | minor...major |
|---|---|---|
| 1 | Current job more satisfying…………………………………………………………………… | 1 2 3 4 |
| 2 | Less contact with and impact on individual students…………………………………………… | 1 2 3 4 |
| 3 | The increase in required work time………………………………………………………………… | 1 2 3 4 |
| 4 | The expected higher profile role with parents and the public……………………………………… | 1 2 3 4 |
| 5 | Salary too low for increased responsibilities and time………………………………………… | 1 2 3 4 |
| 6 | Family considerations - (e.g. moving, time commitment, changed family roles) ……………… | 1 2 3 4 |
| 7 | Annual financial stresses - (e.g. levies, budgets, negotiations)……………………………… | 1 2 3 4 |
| 8 | Would require relocation to another district…………………………………………………… | 1 2 3 4 |
| 9 | The changed role with teachers - to supervision and evaluation………………………………… | 1 2 3 4 |
| 10 | The hiring process is too political……………………………………………………………… | 1 2 3 4 |
| 11 | Too much responsibility for too many things…………………………………………………… | 1 2 3 4 |
| 12 | Having to work closely with a school board and other administrators………………………… | 1 2 3 4 |
| 13 | State and federal paperwork and requirements………………………………………………… | 1 2 3 4 |
| 14 | Too close to retirement…………………………………………………………………………… | 1 2 3 4 |
| 15 | Other:_____ | 1 2 3 4 |

**Changing the Job:**  What changes to the job might encourage you
to become an administrator?

*circle response*
**changes**
**not helpful---very helpful**

| | | not helpful---very helpful |
|---|---|---|
| 1 | Higher salary………………………………………………………………… | 1 2 3 4 |
| 2 | Better retirement benefits……………………………………………………… | 1 2 3 4 |
| 3 | Reduced responsibilities by assigning some duties to other personnel………… | 1 2 3 4 |
| | Which duties?_____ | |
| 4 | Expanded professional development opportunities………………………………… | 1 2 3 4 |
| 5 | More time for instructional leadrship……………………………………………… | 1 2 3 4 |
| 6 | An effective mentoring program…………………………………………………… | 1 2 3 4 |
| 7 | Improved relationship/role definition with Board of Trustees……………………… | 1 2 3 4 |
| 8 | A strong administrative support network………………………………………… | 1 2 3 4 |
| 9 | Expanded internship program…………………………………………………… | 1 2 3 4 |
| 10 | Other:_____ | 1 2 3 4 |

**Retirement Considerations:**                                                  **Number of Years**

1  Years of service in the Teachers' Retirement System (TRS)?              _____

2  When do you expect to retire from education in Montana?  c*heck one*

| | Within 2 years | | Within 6 to 10 years |
|---|---|---|---|
| | Within 3 to 5 years | | After more than 10 years |

3  After retirement from education in Montana, what are your plans?  *check all that apply*

| | Not work on a regular basis | | Be an administrator out-of-state |
|---|---|---|---|
| | Work in the private sector | | Teach out-of-state |
| | Work part-time in education in-state | | Other:_____ |
| | (up to portion allowed while on TRS) | | |

**Other comments:** _____
_____
_____

**Thank you.  Questions?  Call Dori at 406-721-2683.**

Size ☐

# Board of Trustees Chair - Survey

MASS ☐

    With the assistance of a Wallace-Readers Digest grant, a coalition of Montana education agencies
and organizations are examining legislation, policies, and practices that impact the recruitment and retention
of school leaders.  The groups include the Board of Public Education, OPI, The Governor's Office, legislators,
SAM, MSBA, MREA, MEA-MFT, and others.  Your participation in this survey will provide key policymakers
and legislators with your perspective on the complexity of the Montana administrative shortages.
     Your response is very important.  Please take a few minutes to complete the survey.

---

**DIRECTIONS**                                          **Please Return by May 24, 2002**
  1. Please read and answer each question.                    (or as soon as possible)
  2. **All responses are anonymous**.  The identifying code designates school size and
     administration region only.  No individual or district will be identified.
  3. Please complete and return questionnaire to:      **Dori Nielson**
                                                        **502 Livingston Ave.**
                                                        **Missoula, MT 59801**

---

**number of years**

1 How long have you served as chairperson of the school district Board of Trustees?  ☐

2 How many total years have you served on the Board?  ☐

|  | **Yes** | **No** |
|---|---|---|
| 3 Has your district hired administrators within the last five years? | ☐ | ☐ |
| 4 Do you expect to hire a principal or superintendent within the next five years? | ☐ | ☐ |

---

**Recruitment, Hiring, and Retention Incentive - Administrative Positions**
     Districts use many strategies to hire and keep qualified administrators in their positions.
     In your district, which of the following have you used in the past several years?

|  | **Yes** | **No** |
|---|---|---|
| 1 A planned process for recruiting administrators…………………………………….. | ☐ | ☐ |
| 2 Encouragement of qualified district personnel to apply…………………………….. | ☐ | ☐ |
| 3 A formal mentor program for new administrators…………………………………….. | ☐ | ☐ |
| 4 Housing or a housing subsidy……………………………………………………… | ☐ | ☐ |
| 5 Signing or moving bonuses……………………………………………………….. | ☐ | ☐ |
| 6 Expanded insurance options……………………………………………………….. | ☐ | ☐ |
| 7 Car or transportation allowance…………………………………………………….. | ☐ | ☐ |
| 8 Money and/or support to attend professional development activities…………….. | ☐ | ☐ |
| 9 Paid annuity, IRA, or other type retirement benefit……………………………….. | ☐ | ☐ |
| 10 Dues paid for professional associations…………………………………………….. | ☐ | ☐ |
| 11 Longevity bonuses………………………………………………………………… | ☐ | ☐ |
| 12 Bonuses for quality performance………………………………………………….. | ☐ | ☐ |
| 13 Willingness to negotiate salary and benefits…………………………………….. | ☐ | ☐ |
| 14 Other:_____ | ☐ | ☐ |
| 15 Other:_____ | ☐ | ☐ |

---

The Office of Public Instruction supports an administrative internship program which allows districts, under certain circumstances, to appoint a current staff person to become an administrator within that district.

    - Has your district participated in this internship program?            ____Yes   ____No

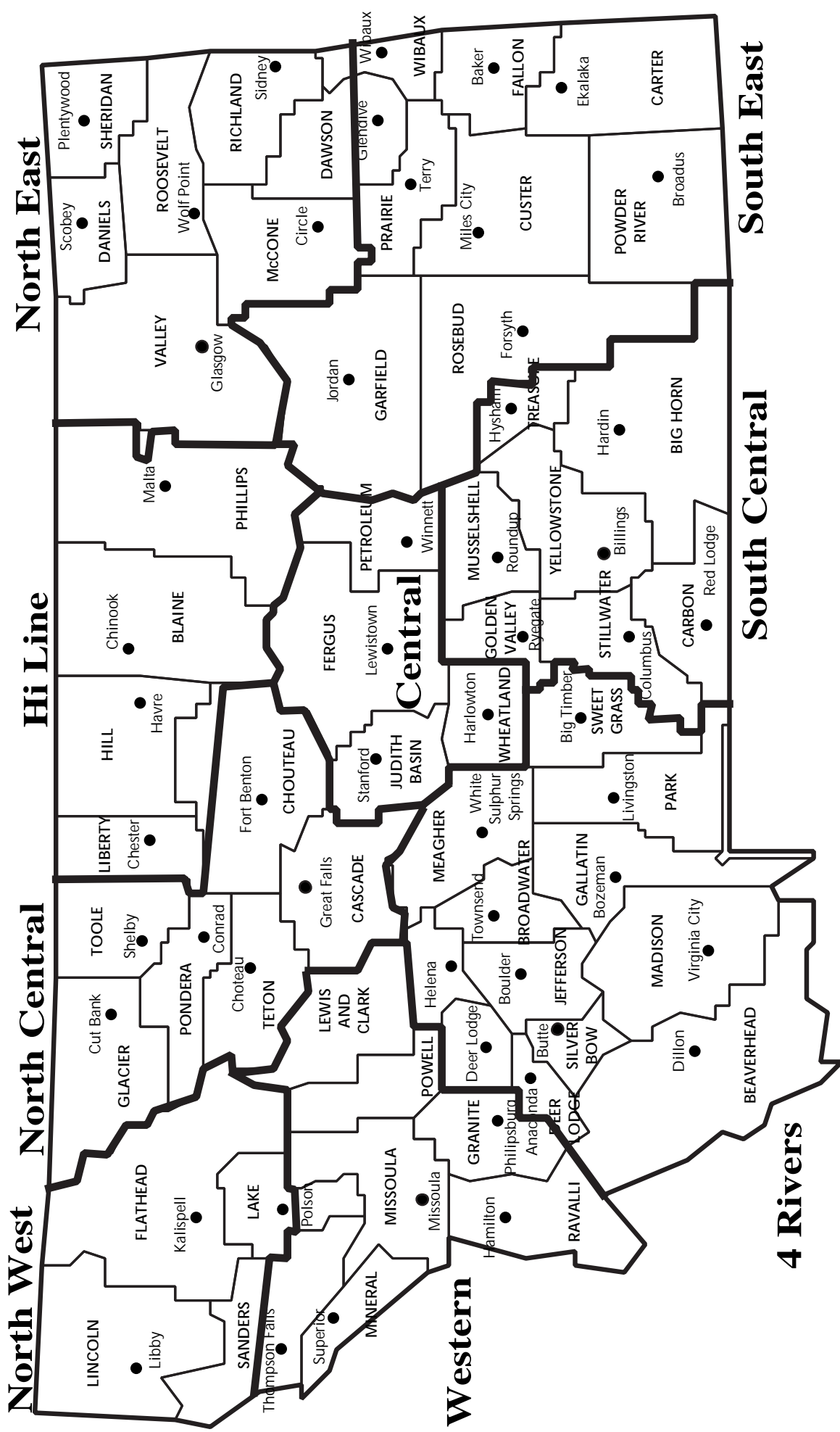    - Do you feel this program assists districts to meet their administrative needs?    ____Yes   ____No

Comments:_____

_____

---

### Difficulties Encountered When Hiring School Administrators

*circle response*
**difficulty**
**little---great**

| | | |
|---|---|---|
| 1 Small pool of applicants………………………………………………………… | 1 2 3 4 |
| 2 Unqualified applicants…………………………………………………………. | 1 2 3 4 |
| 3 Applicants did not have appropriate Montana certification…………………………… | 1 2 3 4 |
| 4 Lack of previous administrative experience……………………………………….. | 1 2 3 4 |
| 5 Candidates wanted higher salary than offered…………………………………….. | 1 2 3 4 |
| 6 Applicants did not wish to live in community…………………………………….. | 1 2 3 4 |
| 7 Local qualified personnel chose not to apply……………………………………. | 1 2 3 4 |
| 8 Opportunities not available for applicant's family members…………………………. | 1 2 3 4 |
| 9 Other:_____ | 1 2 3 4 |

Comments_____

_____

---

### Preparation of Superintendents

Please indicate the degree to which you feel superintendents you've worked with were prepared to deal with the following:

*circle response*
**preparation level**
**low---high**

| | | |
|---|---|---|
| 1 Finances and budget…………………………………………………………… | 1 2 3 4 |
| 2 Facilities planning and management…………………………………………….. | 1 2 3 4 |
| 3 Curriculum and instruction leadership……..…………………………………….. | 1 2 3 4 |
| 4 Labor relations/collective bargaining……………………………………………. | 1 2 3 4 |
| 5 Legal issues/school law……………………………………………………….. | 1 2 3 4 |
| 6 Technology integration………………………………………………………….. | 1 2 3 4 |
| 7 Community relations…………………………………………………………….. | 1 2 3 4 |
| 8 Staff relations…………………………………………………………………. | 1 2 3 4 |
| 9 Leadership and change strategies……………………………………………….. | 1 2 3 4 |
| 10 Assessment/evaluation………………………………………………………….. | 1 2 3 4 |
| 11 Other_____ | 1 2 3 4 |

---

### Administrators' Concerns:
School administrators express several reasons why they leave positions. Please provide your perspective on the degree to which these reasons may have contributed to administrators leaving your district.

*circle response*
**reason for leaving**
**minor---major**

| | | |
|---|---|---|
| 1 Working hours/time demands……………………………………………….. | 1 2 3 4 |
| 2 Inadequate school funding…………………………………………………… | 1 2 3 4 |
| 3 Increasing intensity of student needs…………………………………………. | 1 2 3 4 |
| 4 Personal/professional isolation………………………………………………. | 1 2 3 4 |
| 5 Conflicts with parents and community members……………………………….. | 1 2 3 4 |
| 6 Strained relationships with district teachers and administrators…………………….. | 1 2 3 4 |
| 7 Multiple responsibilities and skills required……………………………………. | 1 2 3 4 |
| 8 Expanded state and federal program requirements……………………………….. | 1 2 3 4 |
| 9 Administrators' evaluation process and instrument used………………………….. | 1 2 3 4 |
| 10 Other:_____ | 1 2 3 4 |

# Montana Association of School Superintendents

**North West** **North Central** **Hi Line** **North East**

**Western** **Central** **South Central** **South East**

**4 Rivers**

LINCOLN
Libby

SANDERS
Thompson Falls

FLATHEAD
Kalispell

LAKE
Polson

GLACIER
Cut Bank

TOOLE
Shelby

PONDERA
Conrad

TETON
Choteau

LIBERTY
Chester

HILL
Havre

CHOUTEAU
Fort Benton

BLAINE
Chinook

PHILLIPS
Malta

VALLEY
Glasgow

DANIELS
Scobey

SHERIDAN
Plentywood

ROOSEVELT
Wolf Point

DAWSON
Glendive

RICHLAND
Sidney

McCONE
Circle

PRAIRIE
Terry

WIBAUX

FALLON
Baker

CARTER
Ekalaka

CUSTER
Miles City

POWDER RIVER
Broadus

GARFIELD
Jordan

ROSEBUD
Forsyth

PETROLEUM
Winnett

FERGUS
Lewistown

JUDITH BASIN
Stanford

CASCADE
Great Falls

LEWIS AND CLARK
Helena

POWELL
Deer Lodge

GRANITE
Philipsburg

RAVALLI
Hamilton

MISSOULA
Missoula

MINERAL
Superior

MEAGHER
White Sulphur Springs

WHEATLAND
Harlowton

GOLDEN VALLEY
Ryegate

MUSSELSHELL
Roundup

TREASURE
Hysham

BIG HORN
Hardin

YELLOWSTONE
Billings

STILLWATER
Columbus

SWEET GRASS
Big Timber

PARK
Livingston

CARBON
Red Lodge

BROADWATER
Townsend

GALLATIN
Bozeman

JEFFERSON
Boulder

SILVER BOW
Butte

DEER LODGE
Anaconda

MADISON
Virginia City

BEAVERHEAD
Dillon

## Montana School District Size Categories

Use of district size categories using student enrollment or average number belonging (ANB) provides a perspective for schools with similar characteristics.

### Office of Public Instruction (OPI) District Size Categories

| Size Category | Enrollment Elementary | Enrollment High School |
|---|---|---|
| 1E 1H | over 2000 | Over 1250 |
| 2E 2H | 851-2000 | 401-1250 |
| 3E 3H | 401-850 | 201-400 |
| 1K | K-12 400 or greater | |
| 4E 4H | 151-400 | 76-200 |
| 2K | K-12 399 or fewer | |
| 5E 5H | 41-150 | 75 or fewer |
| 6E | 40 or fewer | |

Table D-1
State Action for Education Leadership Project
Survey Response rates by District Size

| School Systems | Superintendents and Principals | | | Qualified – Not Employed as Admin | | | Board Chairs | | |
|---|---|---|---|---|---|---|---|---|---|
| | mailed | returned | % | mailed | returned | % | mailed | Returned | % |
| 1E 1H | 112 | 77 | | 168 | 75 | | 7 | 5 | |
| 2E 2H | 90 | 78 | | 49 | 23 | | 18 | 9 | |
| 3E 3H | 78 | 57 | | 25 | 15 | | 23 | 13 | |
| 1K | 50 | 45 | | 12 | 7 | | 13 | 6 | |
| Larger districts | 330 | 258 | 78% | 254 | 122 | 48% | 61 | 33 | 54% |
| | | | | | | | | | |
| 4E 4H | 121 | 90 | | 23 | 10 | | 53 | 23 | |
| 5E 5H | 76 | 56 | | 11 | 5 | | 74 | 16 | |
| 2K | 59 | 46 | | 10 | 5 | | 42 | 20 | |
| Smaller districts | 256 | 192 | 75% | 44 | 20 | 45% | 171 | 59 | 35% |
| Total | 586 | 450 | 77% | 298 | 142 | 48% | 232 | 92 | 40% |

Table D-2
Response Rates by Geographic Area

| Area | Superintendents and Principals | | | Qualified – Not Employed as Admin | | | Board Chairs | | |
|---|---|---|---|---|---|---|---|---|---|
| | mailed | returned | % | mailed | Returned | % | mailed | Returned | % |
| Northwest | 64 | 52 | | 20 | 8 | | 27 | 11 | |
| Western | 92 | 77 | | 51 | 26 | | 34 | 16 | |
| Four Rivers | 111 | 90 | | 85 | 45 | | 38 | 16 | |
| West | 267 | 219 | 82% | 156 | 79 | 51% | 99 | 43 | 42% |
| | | | | | | | | | |
| North Central | 78 | 54 | | 58 | 25 | | 26 | 10 | |
| Central | 21 | 14 | | 5 | 4 | | 12 | 3 | |
| South Central | 98 | 75 | | 52 | 20 | | 35 | 13 | |
| Center | 197 | 143 | 73% | 115 | 49 | 43% | 73 | 26 | 36% |
| | | | | | | | | | |
| Hi-line | 36 | 26 | | 7 | 3 | | 17 | 9 | |
| Northeast | 46 | 30 | | 13 | 7 | | 26 | 11 | |
| Southeast | 40 | 32 | | 7 | 4 | | 17 | 3 | |
| East | 122 | 88 | 72% | 27 | 14 | 52% | 60 | 23 | 38% |
| Total | 586 | 450 | 77% | 298 | 142 | 48% | 232 | 92 | 40% |

**Montana Student Enrollment by District Size Category and Geographic Region**

The larger districts include those systems and districts in the size categories with more than 600 students (only two in the 1K category have fewer than 600 students) and independent elementary schools with more than 400 students. The others were grouped as smaller districts. District size category 6E includes elementary districts of 40 or fewer that are not part of a "system" and do not employ administrators. The MASS regions were diagonally grouped into three areas: West (Four Rivers, Northwest, and Western regions), Center (Central, North Central, and South Central), and East (Hi-Line, Northeast, and Southeast Regions).

**2001-2002 Enrollment by Size Category and Geographic Region**

| OPI District Size Categories | | | MASS Regions | | |
|---|---|---|---|---|---|
| **Larger districts** | **Enrollment** | **% of Total** | **West** | **Enrollment** | **% of Total** |
| 1E 1H | 59,771 | 39% | Northwest | 19,040 | 12% |
| 2E 2H | 28,843 | 19% | Four Rivers | 34,728 | 23% |
| 3E 3H | 16,650 | 11% | Western | 25,278 | 17% |
| 1K | 11,781 | 8% | West total | | 52% |
| Total Larger | | 77% | **Center** | | |
| **Smaller districts** | | | North Central | 20,681 | 13% |
| 4E 4H | 18,930 | 13% | Central | 3,057 | 2% |
| 2K | 5,629 | 4% | South Central | 28,540 | 19% |
| 5E 5H | 7,993 | 5% | Center total | | 34% |
| 6E | 1,290 | 1% | **East** | | |
| Total Smaller | | 23% | Hi-Line | 6,100 | 4% |
| | | | Northeast | 7,316 | 5% |
| | | | Southeast | 7,126 | 5% |
| | | | East total | | 14% |